

**FORSYTH COUNTY**  
**BOARD OF COMMISSIONERS**

**BRIEFING  
DRAFT**

MEETING DATE: JUNE 21, 2018

AGENDA ITEM NUMBER: 20

**SUBJECT: RESOLUTION DENYING A REFUND REQUEST TO THE TAX  
ASSESSOR/COLLECTOR IN THE AMOUNT OF \$15,891.75**

**COUNTY MANAGER'S RECOMMENDATION OR COMMENTS:**

**SUMMARY OF INFORMATION:**

In accordance with the provisions of N.C.G.S. 105-381, the Tax Assessor/Collector has determined that the taxpayers identified on the attached item are not eligible for a refund.

ATTACHMENTS:  YES  NO

SIGNATURE: \_\_\_\_\_

COUNTY MANAGER

DATE: \_\_\_\_\_

**RESOLUTION DENYING A REFUND REQUEST TO THE TAX  
ASSESSOR/COLLECTOR**

**WHEREAS**, John Burgiss, Forsyth County Tax Assessor/Collector has certified that the taxes paid on the attached listing of city and county taxes were levied and assessed legally and without clerical error; and

**WHEREAS**, the taxpayers, Richard and Felice Brenner, have made demand in writing for a refund of taxes, however the tax amount has been certified by the Tax Assessor/Collector as not being in excess of the amounts legally due in accordance with N.C.G.S. 105-381; and

**WHEREAS**, the Tax Assessor/Collector has therefore determined that, as a result of the foregoing, there were no overpayments of taxes which should be refunded for the following Fiscal Year:

2018 – 2019	\$15,891.75
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; and

**NOW THEREFORE, BE IT RESOLVED** by the Forsyth County Board of Commissioners that the request for an individual refund of taxes in the amount of \$15,891.75 by Richard and Felice Brenner, is hereby denied upon the recommendation of John Burgiss, Forsyth County Tax Assessor/Collector.

Adopted this the 21<sup>st</sup> day of June 2018.

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## M E M O R A N D U M

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**DATE:** JUNE 5, 2018  
**TO:** Dudley Watts  
County Manager  
**FROM:** John T. Burgiss  
Tax Assessor/Collector  
**RE:** Tax Refunds

In accordance with procedures established with the Commissioners, the attached list of taxpayers are not due a refund of County taxes totaling \$8,704.43, including applicable interest, and a refund of municipal taxes totaling \$7,187.32, including applicable interest. The taxpayer's name is shown along with the reason for the refund denial and the amount. I am available to answer any questions you may have.

I, John Burgiss, Forsyth County Tax Assessor/Collector, do hereby certify that the attached list of taxes were required to be paid, and have been collected, without clerical error or by a tax illegally levied and assessed. The taxpayers have made demand in writing for the refund of such taxes paid, and the amounts shown on this list are not in excess of the amounts legally due by the taxpayers and should not be refunded for the reasons hereinafter set forth in accordance with N.C.G.S. 105-381.

  
\_\_\_\_\_  
John Burgiss, RES  
Assessor/Collector

JTB/tcl

Glenn West  
Forsyth County Tax Assessor  
201 N Chestnut St.  
Winston-Salem, NC 27101

May 9, 2018

Re: Property Tax refund Request for 464 Sheffield Drive

Dear Mr. West,

Thank you for your voice mail on May 8, 2018 to my request for a property tax refund. You stated that the city did not have a provision for refunds and suggested we discuss with our closing attorney if provisions were made for this pre-payment (we did discuss this and no provisions were made) and to submit a request in writing.

Background:

1. December 29, 2017, we paid our 2017 property tax of \$15,891.75.
2. December 29, 2017 we prepaid our 2018 property tax in the amount of \$15,891.75 in anticipation of new tax laws that might provide a deduction for this tax.
3. April 10, 2018, our home was sold and at closing, the prorated property tax for 2017 was included in the closing statement.

Since we have sold the home and paid our taxes, we hereby request a refund be sent to us in the amount of \$15,891.75 and mailed to 2649 Club Park Dr. Winston-Salem, NC 27104.

If you want to discuss this in person, we are happy to come down or feel free to call me at 336-918-0254.

Thank you in advance for your help.

Sincerely,



Richard A. Brenner



Felice R. Brenner

CC

Tanu Kngur Esq.- Kagur and Porter

NCPTS = Billing

Bills(0) WESTWG Search Type Bill #  Go

Workflow Admin Options Help

NCPTS -> Billing -> Bill Search Results -> Bill Detail

PDF  Export

Bill #: 000011299-2018-2018-0000-00 PRV  
 Bill Status: PAID Returned Mail: NA

**Taxpayer Info**

Owner Id	ID Number	COA Code	Name	Mailing Address	Ownership Type	Owner Order	Ownership %	Group Number	Send Mail	Relief Eligibility
10352242	SOCIAL-***-**-2073		BRENNER, RICHARD A	464 SHEFFIELD DR WINSTON SALEM NC 27104-2018	INDIVIDUAL	PRIMARY	100.0000		YES	NO
10352243	SOCIAL-***-**-8866		BRENNER, FELICE R	464 SHEFFIELD DR WINSTON-SALEM NC 27104-2018	INDIVIDUAL	SECONDARY	100.0000		NO	NO

**Property Info**

	Value (\$)	Adj Value (\$)
Real:	1,203,100	0
Deferred:	0	0
Use:	1,203,100	0
Personal:	0	0
Exempt:	0	0
Total Value:	1,203,100	0

**Bill Info**

Source Type/System: REI PROPERTY TAX  
 Abstract #: 000011299-2018-2018-0000  
 Bill Date: 01/05/2018 Created By: LEEDBC  
 Interest Begin Date: Interest Freeze Date:  
 Bill Due Date: 09/01/2017 Final Payment Date:

Lender: Parcel#: 6815-79-9879.000  
 Description: LO161B BL1439  
 Situs: 464 SHEFFIELD DR WINSTON-SALEM NC 27104

**Property Details**

**Tax Amount**

# Months	Description	Original Billed(\$)	Current Due (\$)
	Tax & Fees	15,891.75	15,891.75
	Interest		0.00
	Collection Fees		0.00
	Expenses		0.00
	<b>Total</b>	<b>15,891.75</b>	<b>0.00</b>

**Payment History**

**Transaction Summary**

**Transaction Detail History**

Billed					History	
Tax District	# Months	Taxes & Fees (\$)	Interest (\$)	Total (\$)	ADVANCE 01/05/2018 (-\$)	Current Due (= \$)
FORSYTH TAX	12	8,704.43		8,704.43		0.00
WINSTON-SALEM TAX	12	7,187.32		7,187.32		0.00
<b>Tax &amp; Fees Total</b>		<b>15,891.75</b>		<b>15,891.75</b>		<b>0.00</b>
<b>Interest Total</b>						
<b>Grand Total</b>		<b>15,891.75</b>		<b>15,891.75</b>	<b>15,891.75</b>	<b>0.00</b>

Flag  Link IDs  Agents  Notes/Documents  Change History  Owner History

Flag:

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